

Tourism Advisory Committee

Part 1: Current Conditions

Open House

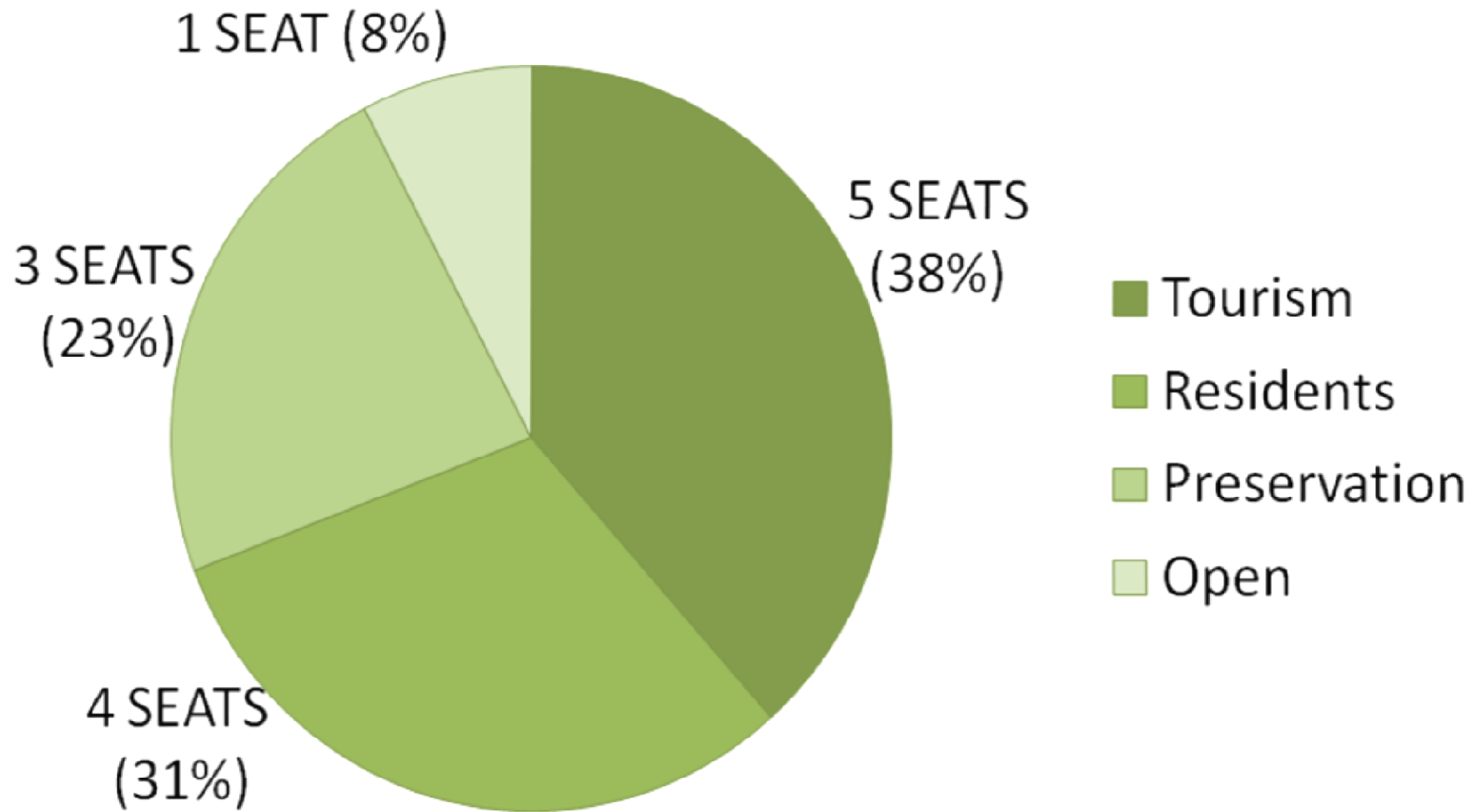
January 8, 2013

TOURISM ADVISORY COMMITTEE (TAC)

- Make policy recommendations to the City in the areas of:
 - parking and the routine of tourism-related traffic activities,
 - the qualification and licensing of tour guides, and
 - the enforcement of tourism management regulations and other related issues.



TAC COMPOSITION



DOUBLE DECKER BUS PROPOSAL ?



- Section 6-1502
- “Such vehicles shall be no more than 13 feet in height, shall load and unload passengers only on the right hand or curb side, shall not have double-deck passenger compartments, shall not be combination or train-type vehicles...”



**TAC SPECIAL CALL MEETING,
2ND FLOOR MEDIA ROOM, CITY HALL
TUESDAY, JANUARY 15, 8:30 A.M.**

DOWNTOWN SAVANNAH

- Residents
 - 25,000 representing 8,546 households
- Businesses
 - 15,300 employees
 - 450 businesses
 - \$283.9 million in sales
- Students
 - 7,000
- Visitors
 - 6.8 million overnight with 5.3 million day trippers
 - \$1.94 billion in direct spending



TOURISM'S IMPACT ON SAVANNAH/CHATHAM COUNTY

Description	2007	2008	2009	2010	2011
Number of Lodging Rooms (1)	13,110	13,898	14,745	14,893	15,026
Person-Stays (2)	6.6 Million*	6.1 Million*	6.1 Million^ (Overnight) 5.1 Million^ (Day Trippers)	6.3 Million^ (Overnight) 5.1 Million^ (Day Trippers)	6.8 Million^ (Overnight) 5.3 Million^ (Day Trippers)
Room Night Demand (1)	3.083 Million	2.991 Million	3.038 Million	3.240 Million	3.343 Million
Direct Spending (2)	\$1.9 Billion*	\$1.9 Billion*	\$1.6 Billion^	\$1.7 Billion^	\$1.94 Billion^
Room Tax Revenue (3)	\$14.3 Million	\$14.0 Million	\$12.9 Million	\$14.4 Million	\$15.5 Million

Sources: Visit Savannah

(1) Smith Travel Research – Chatham County

(2)* D. K. Shifflet and Associates, Ltd. – City of Savannah Only

(2) ^ Longwoods International

(3) City of Savannah/Chatham County/Tybee Island

EXISTING TOURISM SERVICES

- Administrator
 - Tourism Advisory Committee
 - Mediation between stakeholders
 - Planning
- Mobility and Parking Services Department
 - 5 employees (2 supervisors, 3 FT revenue investigators, 1 PT services officer)
- Responsibilities:
 - Test and issue permits for tour guides
 - Conduct private property inspections
 - Address complaint investigations
 - Inspect annually and randomly all tour companies
 - Permit and enforce ordinances and policies



TROLLEY TOURS



CARRIAGE TOURS



QUADRICYCLES



WALKING TOURS



TAXIS



PEDICABS



MOTORCOACHES



SEGWAYS AND BICYCLES

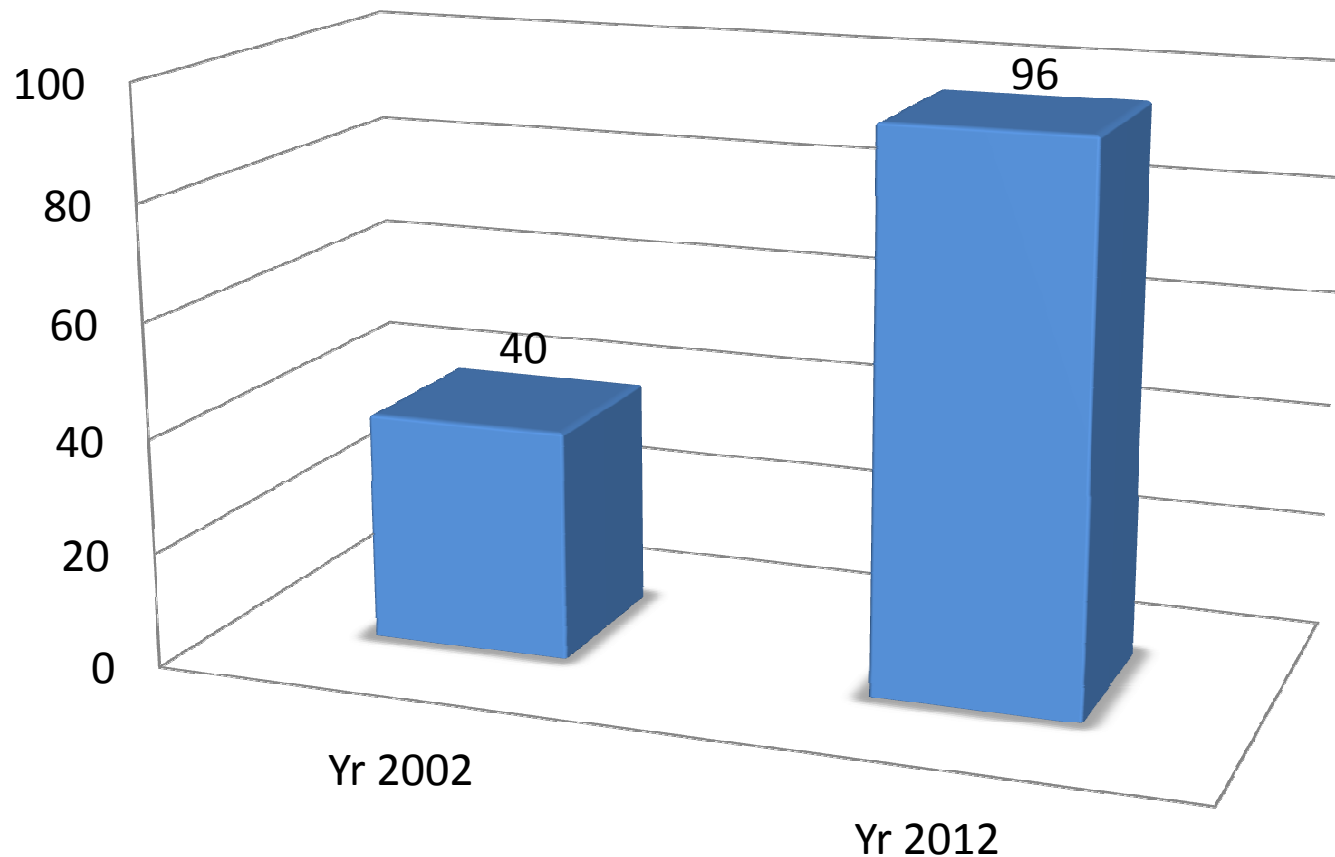


WRECKERS

CURRENT STATE OF AFFAIRS

- **Motor Coaches** → 1,800 to 2,000 permits issued Annually
5-6 per day
50% issued March - June
- **Motorized Tours** → 11 companies with a fleet of 96 vehicles
- **Carriage Tours** → 5 companies with a fleet of 22 Carriages
- **Tour Guides** → 280 Permitted Tour Guides
- **Pedicabs** → 3 companies with 42 Pedicabs
- **Quadricycle** → 2 companies with 7 vehicles

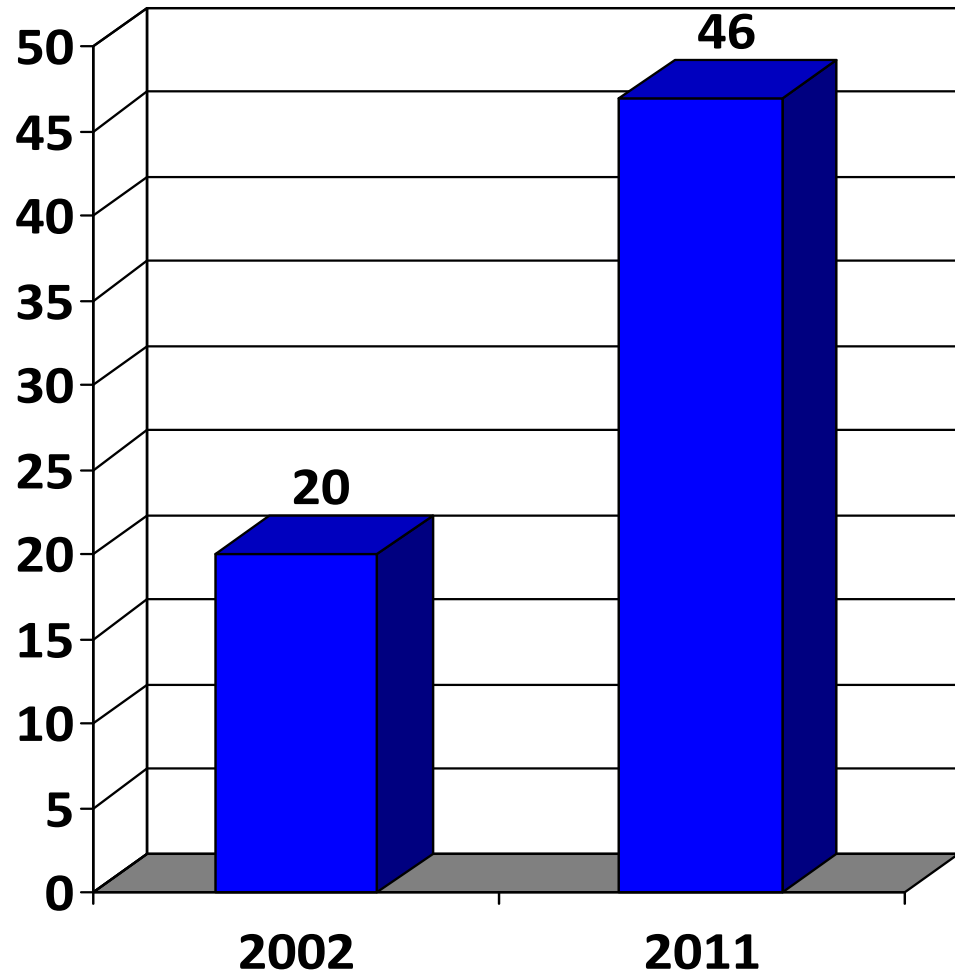
MOTORIZED TOURS



- Represents a 140% growth
- Total of 11 companies in 2012
- Does not include Quadricycles; they are non-motorized
- Motorcoaches are permitted thru a separate process

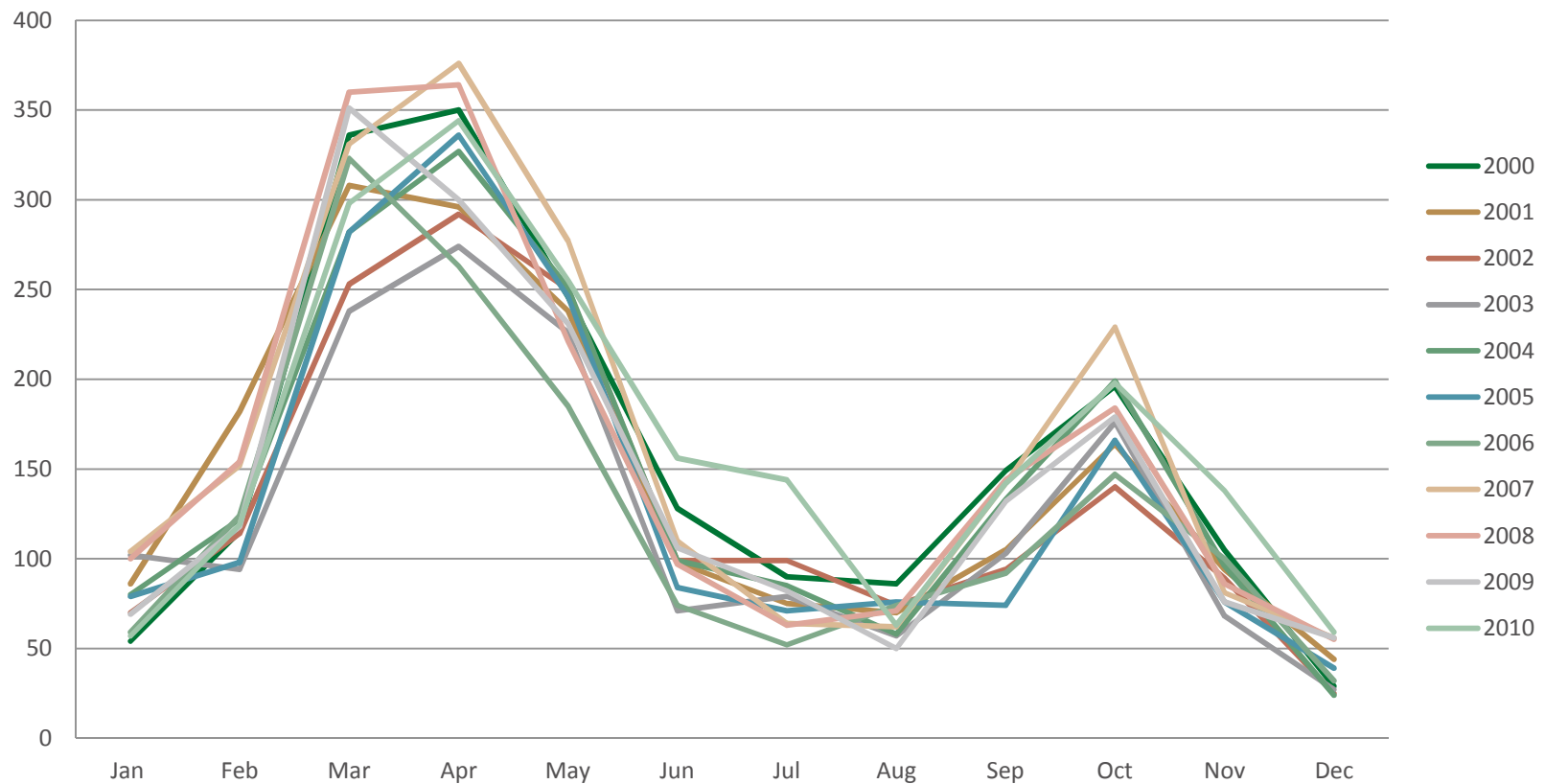
WALKING TOURS

- 130% Increase since 2002



TOURISM SEASONAL & CYCLICAL

Motor Coach Permits Issued by Month



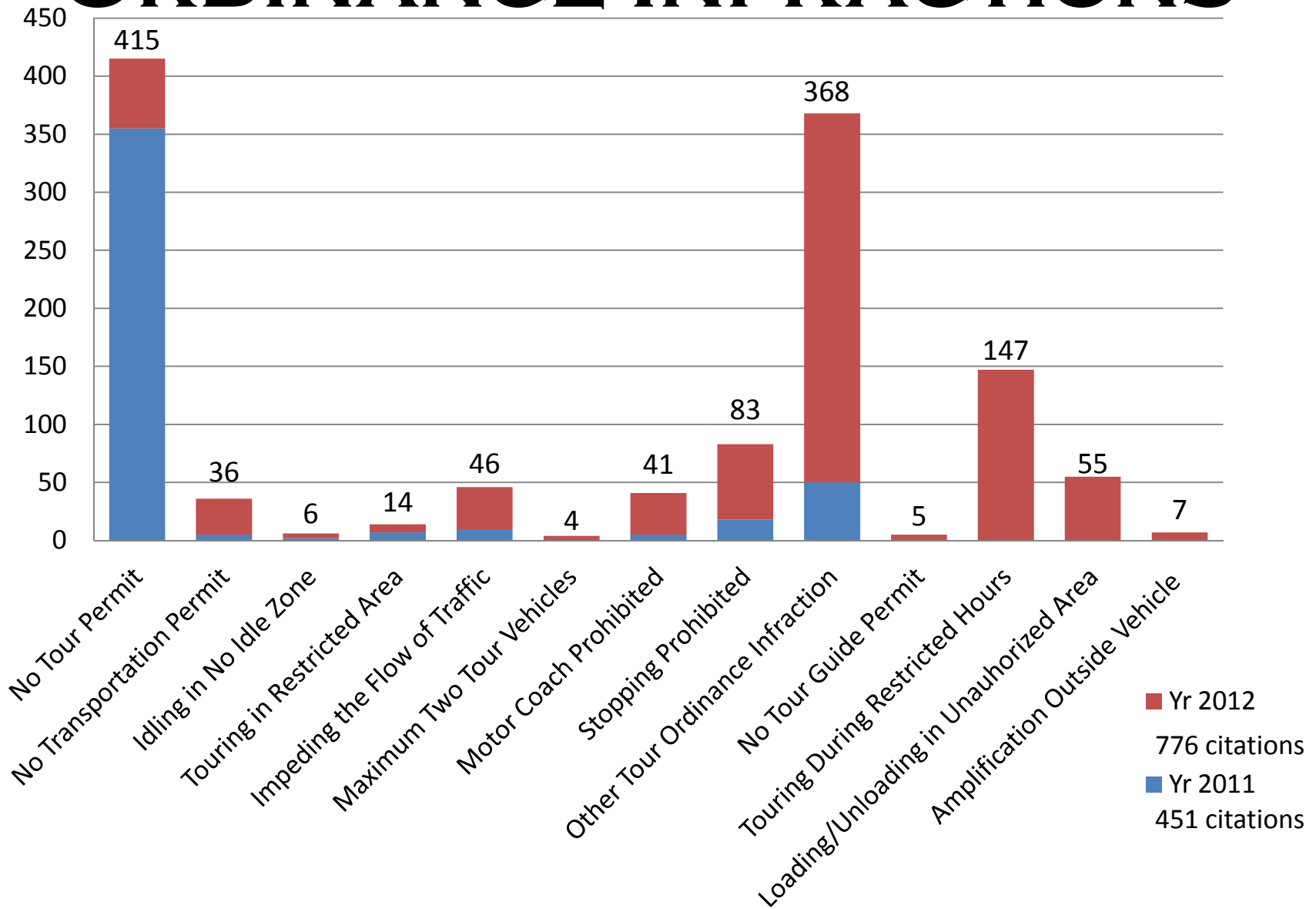
CURRENT RESTRICTIONS

- All tours permitted to operate between the hours of 8:00 a.m. and midnight unless designated as a hotspot for walking tours
- “Hotspot” designated by the City Manager where walking tours are prohibited from operating at certain times or under certain conditions
 - 400 block of East St. Julian Street
 - Washington Square
 - 8:00 p.m. to 10:00 a.m. (Nov 1 thru Feb 28)
 - 9:30 p.m. to 10:00 a.m. (Mar 1 thru Oct 31)

CURRENT RESTRICTIONS

- City Manager can assign areas of the historic district where:
 - a maximum of two tour vehicles may be present on a square/street segment at the same time
 - tour vehicles are limited to a maximum of one trip around a square during the course of a tour.
 - Lafayette, Madison, Washington and Monterey squares
- City monitors areas with frequent violations/complaints:
 - 300 block of East President Street
 - Columbia Square
 - Greene Square
 - 200 Abercorn Street
 - Calhoun Square
 - W. Boundary at Oglethorpe Avenue
 - 300 block of Martin Luther King, Jr. Boulevard
 - 500 East St. Julian Street

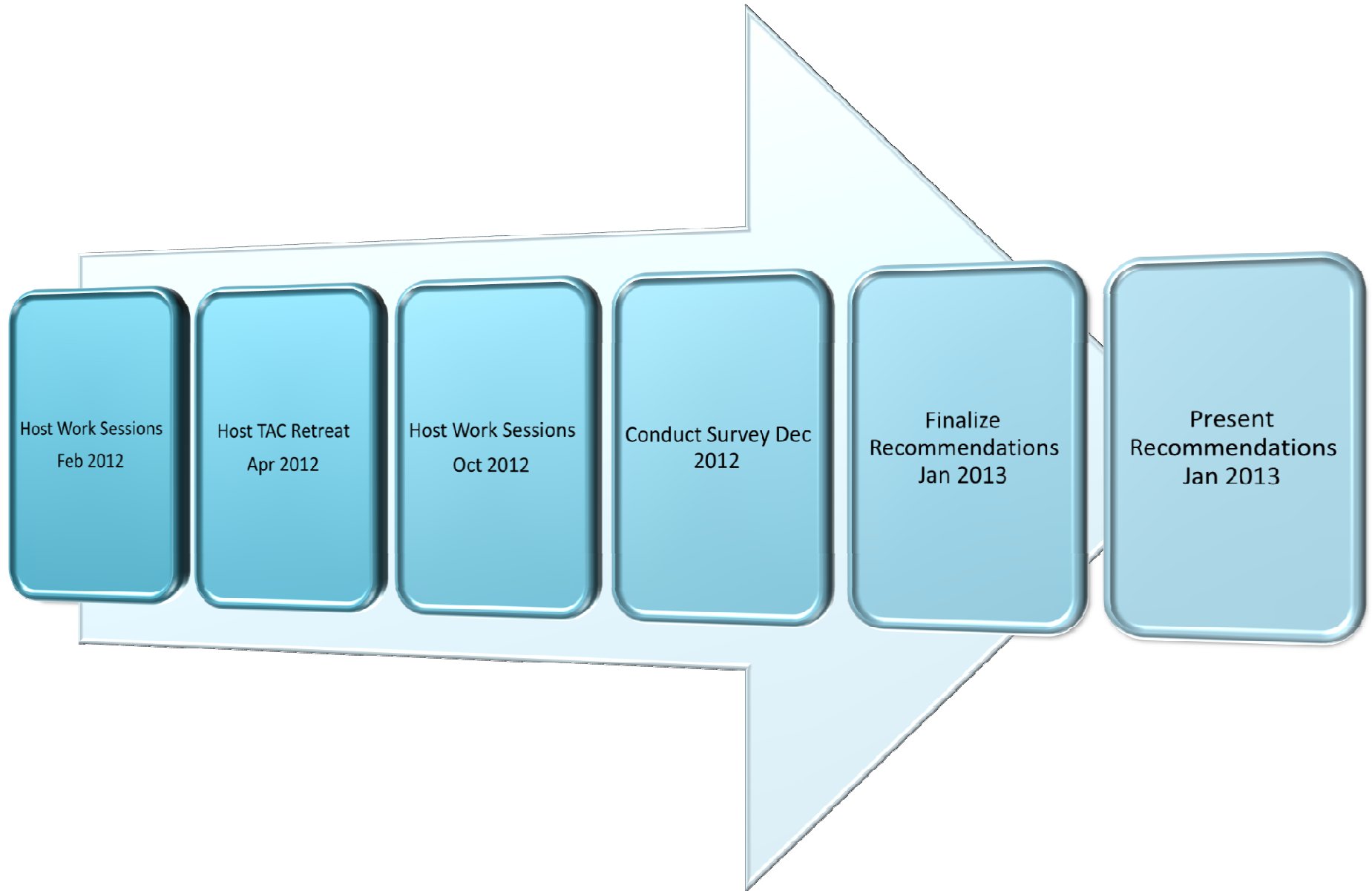
ORDINANCE INFRACTIONS



Tourism Advisory Committee
Part 2: Proposed Recommendations

Open House
January 8, 2013

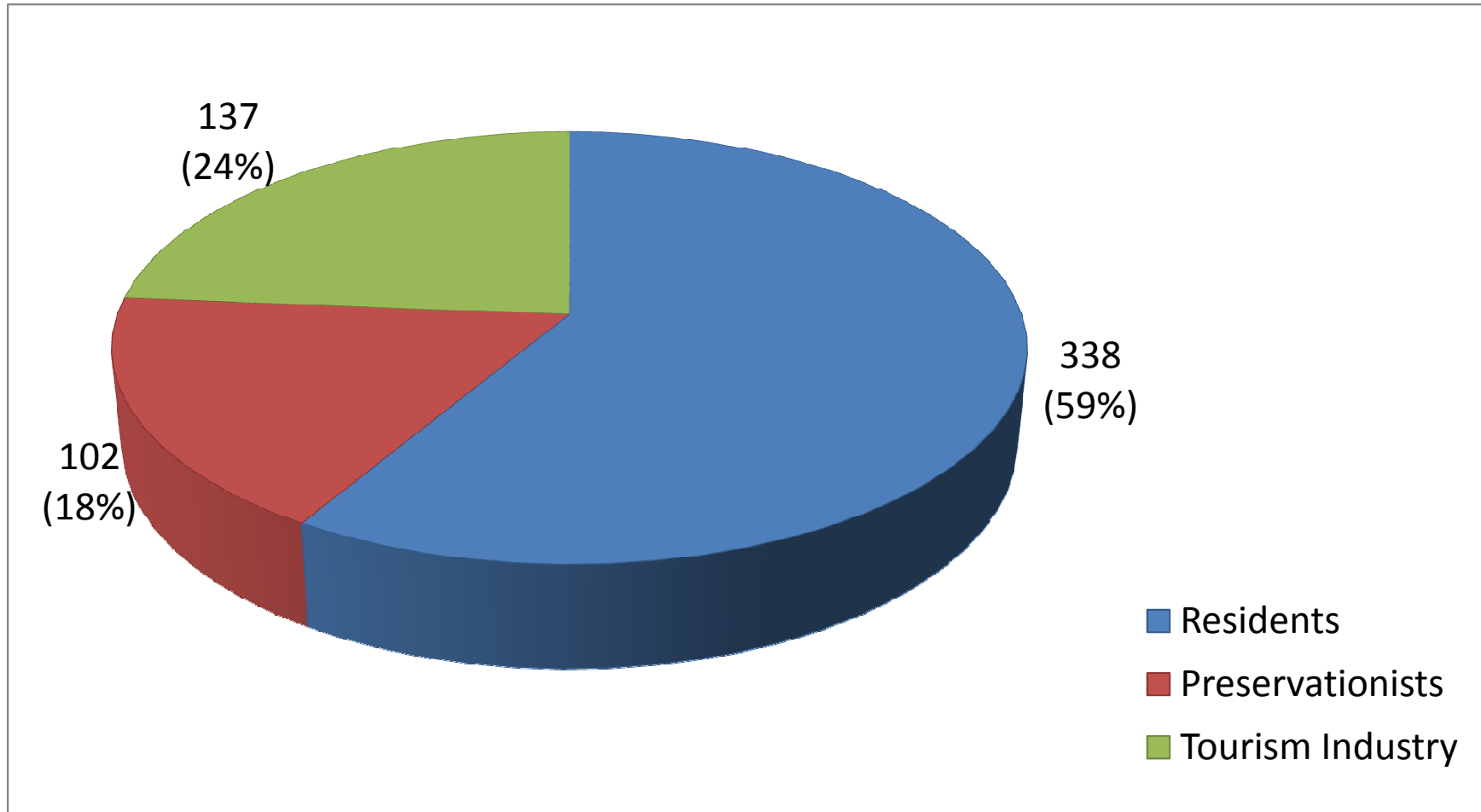
TAC PROCESS





Savannah tourism embraces its vibrant future while maintaining its historical integrity and respecting the unique residential and pedestrian quality of life. Our community must be balanced, sensitive and well-managed to assure an enhanced quality of life for residents and a high quality visitor experience.

SURVEY RESPONSES



PROPOSED RECOMMENDATION: REQUIRED ANNUAL MEETING

- All licensed tour operators must attend an annual ordinance review meeting sponsored by the City at different times during the year to ensure compliance with regulations
 - Commence 2nd quarter 2013
 - TAC to develop agenda
 - Part of renewal process and new license for all tour operators

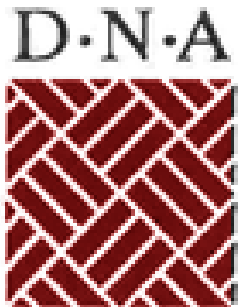
PROPOSED RECOMMENDATION: ENHANCE TOUR SERVICES

- Restructure and centralize existing City's tourism related services to address the following:
 - Manage tour services
 - Mediate and resolve tourism and quality of life issues
 - Communicate information to the public regularly; include a feedback loop
 - Create a tourism plan which works to balance quality of life, preservation and tourism industry



PROPOSED RECOMMENDATION: ENHANCE TOUR SERVICES

- Protect historic assets
- Respect resident's quality of life
- Support the local tourism industry
- Provide the best possible experience for visitors
- Partner and build consensus with Downtown Neighborhood Association, Historic Savannah Foundation, Tourism Leadership Council, Visit Savannah and others



PROPOSED RECOMMENDATION: ENFORCEMENT

- Monitor and enforce the compliance of related ordinances
- Ensure that adequate personnel and resources should be available seven days a week while tours are operating on City rights-of-way

Red: Commercial

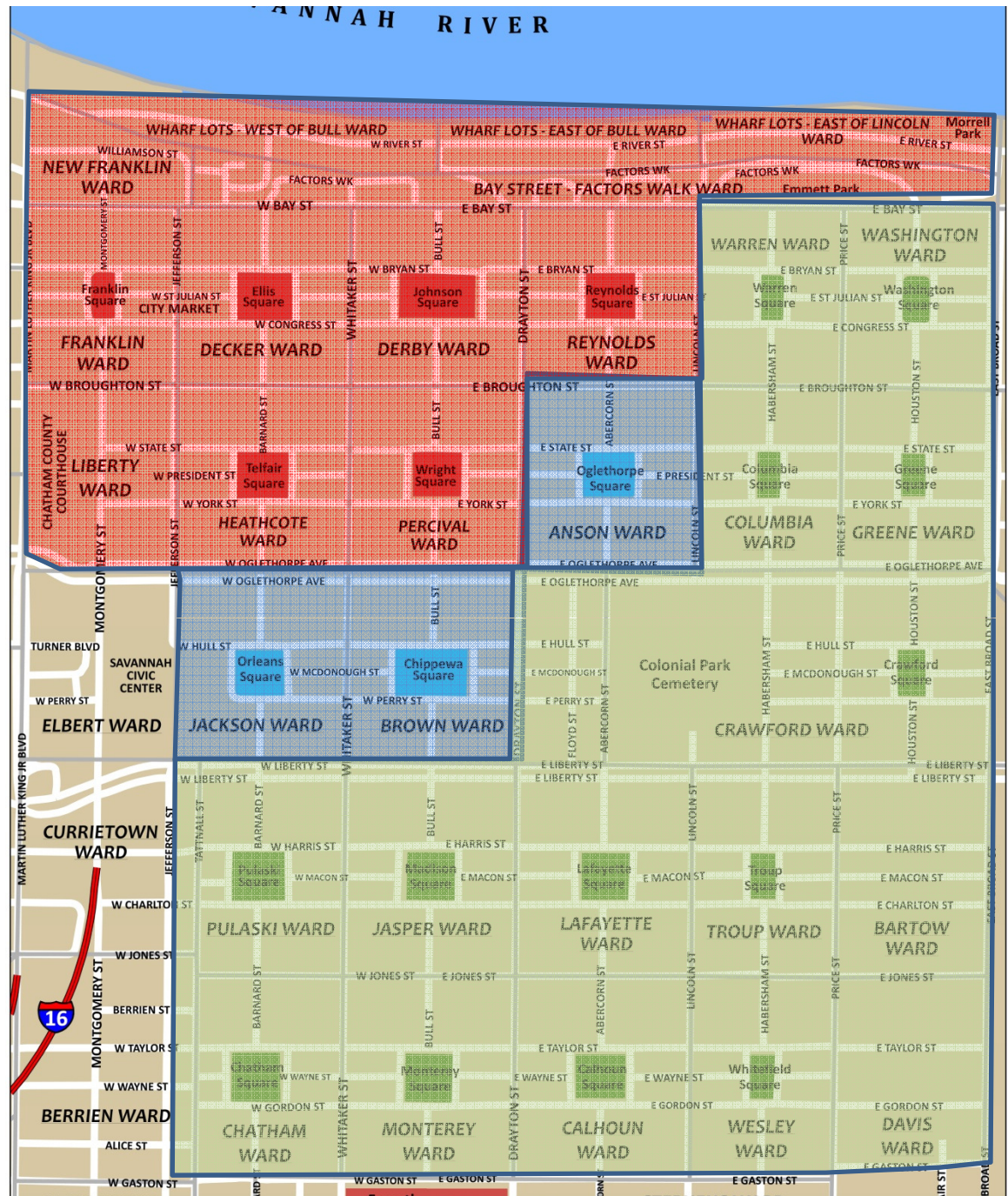
- Franklin
- Ellis
- Johnson
- Reynolds
- Telfair
- Wright

Blue: Mixed Use:

- Oglethorpe
- Orleans
- Chippewa

Green: Residential

- Columbia
- Greene
- Warren
- Washington
- Pulaski
- Madison
- Lafayette
- Troup
- Chatham
- Crawford
- Monterey
- Calhoun
- Whitefield



PROPOSED RECOMMENDATION: MODIFY RESTRICTIONS

- No more “hotspots”—use one term for all tours
- “Residential zones”
 - Limit tour hours impacting residential areas on the weekends (Friday, Saturday, holidays)
 - Limit tour hours impacting residential areas on the weekdays (Sunday through Thursday)
 - Limit number of tour vehicles that can be present on a residential square or street segment at one time
- Need to work with TAC, DNA and Tour industry to determine appropriate times

PROPOSED RECOMMENDATION: ADDRESS OVERSATURATION

- Place a temporary moratorium on all new tour companies and existing companies entering into the market place for 6 months
- Recommend capping system for all tour companies
- Continue to permit motorcoachs thru existing process
- Better regulate tourism industry and enable the city to raise the standards of all tours

PROPOSED RECOMMENDATION: CAPPING SYSTEM

- Cap the number of:
 - Types of tours
 - Tour vehicles by geographic area
- Consider small business implications to maintain fairness
- Application to new and existing companies
- Unique to Savannah
- Examples:
 - Charleston
 - St. Augustine

EXAMPLE OF PROPOSED SYSTEM

TOUR INDUSTRY	CURRENT NUMBER	PROPOSED CAP 10% INCREASE	PROPOSED CAP 20% INCREASE	PROPOSED CAP 30% INCREASE	CURRENT GROWTH LEVELS 2022
Motorized Tours • Trolleys • Small vehicles • Hearses	96 vehicles	106 vehicles	116 vehicles	125 vehicles	212 vehicles
Carriage Tours	22 carriages	25 carriages	27 carriages	29 carriages	27 carriages
Walking Tours	46 companies	50 companies	55 companies	59 companies	105 companies
Pedicabs	42 pedicabs	47 pedicabs	51 pedicabs	55 pedicabs	84 pedicabs
Quadricycles	7 quadricycles	8 quadricycles	8 quadricycles	9 quadricycles	14 quadricycles
TOTAL	213	236	257	277	442

Need to include non-motorized forms of tours—bicycles, segways, etc.

PROPOSED RECOMMENDATION: WALKING TOURS

- Do more to address safety and enforcement issues and differentiate walking tour companies
 - Need better identification—reflective quality; larger permits
 - Limit the number of people in a tour to 20-25 persons



PROPOSED RECOMMENDATION: NOISE

- Enforce Sec. 6-1545
 - (a) It shall be unlawful to operate loudspeakers outside tour service vehicles within the City; loudspeakers may be operated within the confines of tour service vehicles for the sole benefit of the passengers within the confines
 - (c) No sound shall be audible outside of the tour service vehicle
- Incorporate noise and amplified sound into annual meeting for licensed tour operators and into code of conduct
- Work with zoning to determine better enforcement strategies



PROPOSED RECOMMENDATION



- Create a code of conduct for all licensed tour operators which would be signed upon securing a new tour license or renewal
 - Develop with participation from tour companies
 - Complete by the end of the 1st Quarter 2013
 - Occur with tour renewals/new tour licenses
- Conduct survey of residents to obtain additional feedback on concerns
 - Complete by the end of the 3rd Quarter 2013

OTHER PROPOSED ORDINANCE CHANGES

- Enhance role of tour service review committee
 - Make decisions and recommendations regarding the tour service industry to protect the ambiance and aesthetics of the Historic District
 - Include 2 TAC members (resident and tourism industry)
- Modify language from passive to active
- Group like things in the ordinance together
- Remove miniature lights at night from all tour vehicles—must be safety lights

NEXT STEPS

- TAC Special Call Meeting (Double Decker)
 - January 15, 8:30AM
- TAC General Meeting
 - January 22, Finalize recommendations for City Council
- Council Workshop
 - January 24 (tentative), Present TAC recommendations at City Council Workshop
- All meetings held in 2nd floor Media Room, City Hall
- Open to the public

ONGOING PROCESS TO CONTINUE IN 2013